The Guided Tour Technique in Information Science: Explained and Illustrated

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ABSTRACT

This poster elaborates a research technique—that of the *guided tour*—that has previously been used in qualitative research, including in some studies carried out by information scientists. The guided tour technique hybridizes visual and aural methods; it involves a researcher's relatively shortened, planned entry into a field site, a participant then leading him or her through a personally meaningful location therein while describing and explaining its features, thinking-aloud the ideas, thoughts, and feelings to which it gives rise, and responding to gentle, conversational inquiries (Thomson, 2015). In prior information science work, the technique has offered up-close, in-depth perspectives on information-rich settings, be these home collections, workplace archives, or public spaces like museums. After the technique is introduced, the second portion of this poster is devoted to a comparison of use of the guided tour technique in two research scenarios. The first of these involves guided tours during an in-person study, following the example laid out by prior researchers. The second involves examining data unobtrusively gathered online as a further guided tour adaptation. From these scenarios, it is possible for researchers to see how the guided tour technique can best be applied, its shortcomings, and ways in which it may accommodate research contingencies. The poster concludes by reiterating the value that guided tours can bring to information science work.

Keywords

guided tours, online research methods, qualitative research, research methods.

INTRODUCTION

Social researchers, information scientists included, increasingly turn to qualitative methods when seeking up-close, in-depth insights about a given phenomenon. Vakkari (2008) is among those noting that qualitative information-related research is on the rise. At the same time, the demands of such work and the realities surrounding many researchers—time, budget, or resource constraints—may prevent the design of qualitative studies. Creative methodological compromises can be made within projects, however, that enable the same epistemological spirit to still be embodied.

The guided tour technique represents one such way of compromising or 'working-around.' It is a hybrid visual-aural strategy, and entails a relatively shortened, planned entry into a field site by a researcher. During this visit, a participant will lead the researcher through some personally meaningful location therein and, while doing so, describe and explain features of the space, think-aloud ideas, thoughts, and feelings to which it gives rise, and respond to gentle inquiries (Thomson, 2015).

Guided tours are not a commonly drawn-upon technique in the information science field, but they are nonetheless consistently used there, with a history that spans at least three decades. The earliest known use is by Malone, in 1983, who pointed to a lack of "systematic" understanding about office workers' "personal information environments" (p. 100) among scholars. He included a tour request as one aspect of his semi-structured interviews and, despite these sessions being relatively brief (he estimates no longer than one hour for an entire interview was spent per participant), he produced lasting impressions of "files" and "piles" and of "finding" and "reminding" activities that continue to resonate with *in situ* descriptions of information spaces.

This poster first lays out the guided tour technique, expanding on its background and prior use in the information science field. It moves on to explore the guided tour as a tool for researching in-person and online, presenting and assessing two scenarios in which it was used, enabling discussion of the technique's strengths and weaknesses.

BACKGROUND

In general methodological literature, there exists scant discussion of the guided tour technique as either a stand-alone or complementary, triangulated method within a larger research design. A review of the guided tour's presence in literature both within and outside the domain of information science, however, highlights the fact that much terminological inconsistency—and few references to its origins—complicate identification of 'in-action' examples.

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Though no known information science studies credit him directly, Spradley (1979), a well-known ethnographer, includes "Guided Grand Tours" and "Guided Mini-Tours" as two potential question types that researchers may employ in interviews. He explains that the former "asks the informant to give an actual grand tour—a secretary might be asked: 'Could you show me around the office?'" (p. 87), and he renders the latter as a more focused 'tour' of a smaller site, or even an aspect of an experience.

Spradley's (1979) descriptions of guided tours are short, as befits his methods-centric guidebook. More recently, however, Everett and Barrett (2012) have proffered a highly reflective (and reflexive) discussion of the technique, telling how it aided them in understanding the lasting bond that return visitors form with hometown museums. The pair write that their tours were a means of "observing the ways in which participants engaged with objects, and the experiences that hold personal significance,… exploring feelings and thoughts as they engage,… conversations, comments, facial expressions, and embodied responses" (Everett and Barrett, 2012, p. 35). Later, they underscore how valuable "first-hand experience with the participants in the setting… witnessing" (p. 43-44) was during subsequent data analysis.

With the aim of providing further context around guided tours, Table 1 is included below. It breaks down the technique in terms of four other, more often used, methods to which it bears some resemblance: participant observation, photo elicitation, less-structured interviews, and think-aloud protocols. Respective similarities and divergences are noted.

PRIOR USE

As mentioned, the first information science-related use of the guided tour was likely by Malone (1983). He implies the unique dual nature of the technique by referring to guided tours as both one portion of his overall interview protocol and as a "form of exploratory observation" (p. 101). Unfortunately, however, Malone does not much reflect on his use nor on the value of his guided tours. Yet researchers following him have nonetheless had their attention captured by the technique, and have used it to investigate information phenomena in physical and digital spaces such as homes, dormitories, offices, and computer directories. Still though, they have followed Malone's precedent and provided little methodological reflection. Along with the aforementioned inconsistencies when referencing the technique make it more difficult to gain a solid grasp of guided tours.

The fifteen pieces cited below have been identified as specific information-related examples. Technology-related examples of guided tours seem to be equally as common, but as these tend to focus on people's everyday engagement with technological artifacts rather than what information artifacts these contain, such pieces are not reviewed here. (Baillie (2002; 2003) is one author who does provide short, useful points about her technology-related tours).

QUALITY	PARTICIPANT OBSERVATION	GUIDED TOURS
RESEARCH INSTRUMENT	researcher, poss. w./ data collection guide	researcher, poss. w./ data collection guide
REFLECTION REQUIRED	extensive, via note-keeping	extensive, via note-keeping
TIME REQUIRED	lengthy enough to enable habitualization	bounded, contracted time frame
AIM	cognitive/affective understanding	cognitive/affective understanding
	PHOTO ELICITATION	GUIDED TOURS
ELICITATION SOURCE	imagery	objects, spaces
OCCURRING	retrospectively, w./ participants' recall	simultaneously, in real-time
AIM	"prod latent memory," "stimulate/release emotional statements"[1]	cognitive/affective understanding
	UN-/SEMI-STRUCTURED INTERVIEWS	GUIDED TOURS
RESEARCH INSTRUMENT	researcher, w./ loose interview schedule	researcher, w./ loose interview schedule
'LEADER' ROLE	researcher (approx. 10-45%), participant (approx. 55-90%)	researcher (approx. 10%), participant (approx. 90%)
PROMPTING MECHANISMS	verbal, based in topic/dialogue[2]	"object" and "walking," based in artifacts/setting[3]
	THINK-ALOUD PROTOCOLS	GUIDED TOURS
ELICITATION SOURCE	task or experience	space or location*
OCCURRING	simultaneously, in real-time	simultaneously, in real-time
'LEADER' ROLE	participant, w./ poss. researcher interjections	participant, w./ poss. researcher interjections

Table 1. Comparison of the guided tour technique to similar research methods.
([1]Collier, 1957, p. 858; [2]Bernard 2000, 2002; [3]DeLeon and Cohen, 2005; *Spradley (1978) also mentions a "Task-Related Grand Tour," more akin to the think-aloud.)

Kwasnik (1989, 1991) and Swan, Taylor, and colleagues (2004, 2005, 2008, Taylor et al. 2008) are among those who have, like Malone (1983), toured individuals' physical information spaces. Though all generate rich insights through these tours, they give little explicit detail about strengths of guided tour research. The same is true of those interested in individuals' digital information spaces (and usually, particularly, their means of managing documents and files therein). Barreau (1995) used the technique to study professionals' computer directories, noting the need to capture "context" (p. 331) around digital actions and objects. Others who have done the same include Nardi and colleagues (1994), Boardman and Sasse (2004), Jones and

colleagues (2005), Bergman (2013), and Lindley and colleagues (2013). In all reports, procedural points are more common than reflective ones.

More popular in the past decade has been researchers' exploration of both physical and digital information spaces via guided tours. Examples include Kaye and colleague's (2006) work in 48 academics' offices, Hartel's (2007; 2010) tours of gourmet hobby cooks' home collections, Thomson's (2010) home office tours, McKenzie and Davies' (2012) planner-centric tours, Al-Omar and Cox's (2013) academic office tours, and Mizrachi's (2011; Mizrachi and Bates, 2013) guided tours in dorm rooms of 41 undergraduate students.

Certain themes do emerge from each of these works, even when not stated outright, which coincide with the strengths of guided tours that Everett and Barrett (2012) list. Among these is that guided tours position participants as experts, foreground their voices, and allow active meaning-making to occur. As a result, inconsistencies in participants' reports (e.g., Kaye et al., 2006) or more specific (e.g., Bergman, 2013) and sentimental (e.g., Lindley et al., 2013) data can arise. Everett and Barrett (2012) celebrate not only the "relational quality" but also the "new understandings" (p. 39) that guided tours brought to their own project.

Moreover, guided tours are amenable to—and seem to even encourage, if eight of the fifteen above-mentioned information science studies are an indication—the gathering or creating of arts-informed and visual data. And, perhaps most importantly, tours seem to be enjoyed by participants. Hartel (2010), an exception to researchers' typical skimming-over of their guided tour usage, describes how the cooks in her study "came to life as they led [her] through their home and belongings," providing "very rich data, more valuable than the interviews alone in [enhancing] understanding" (p. 866).

Though it could be criticized as producing a potentially contrived (planned), selective, static snapshot of complex information spaces, the fifteen examples reviewed above seem to indicate—whether explicitly (e.g., as in Hartel, 2007; 2010) or implicitly, via evocative findings—the value of guided tours for information science research in particular.

TWO GUIDED TOUR SCENARIOS

Having overviewed the guided tour technique, two scenarios of its use—in-person and online—are presented below. Drawn from personally conducted research, they allow for a comparison and assessment of the technique's adaptability and affordances. Researchers who are interested in designing a guided tour study may find these illustrated implementations useful.

The home office study: In-person guided tours

Between February and December of 2009, data was collected from four home offices as part of a small-scale thesis study (Thomson, 2010) that explored printing professionals' home-based information spaces and their work-related information acquisition, management, and use activities.

Guided tours were one of three main data collection strategies employed during 'field outings,' the others being semi-structured interviews and non-participant observation. Sequenced first during each data collection period, the tours served as ways to ease the participants (and the researcher) into the study and acquaint them with its purposes.

Following the standard introductory statement of "*I would like you to show me around your home office, especially the different locations and resources that you would go to in order to obtain needed information throughout the workday. Let's start here at the office entranceway*," participants began their tours. Artifact-based object probes (DeLeon and Cohen, 2005) like "Tell me more about this…" and "How do you use this…" elicited more detail as needed. For reasons of comfort and relationship-building, these guided tours were not tape- or video-recorded. Instead, hand-written notes (including spatial diagrams) were made, and photos of each space and its information- related features were taken at varying levels of detail (following Hartel (2007), who drew heavily upon photography during her tours). Some resulting visual data is included in Figure 1 below, suggesting how the tours enhanced the final project.

The invitation to 'take the lead' in the research experience was happily accepted by each participant, furthering the impression that guided tours are captivating and pleasurable to those who take part. So much elaborative detail about their home office spaces, work-related information content, and ways of organizing and using it was readily offered during all of these tours that each participant actually unknowingly answered several questions intended for later interviews.

Figure 1. An example of information-related maps and a photograph from one home office tour.

The YouTube study: Online guided tours

During 2014, data was unobtrusively collected as part of a case study (Thomson, 2014) that investigated the ways in which one "original content creator," *OrganizedLikeJen*, conceptualizes and expounds ideas about: 1) her work as an informal information provider, and 2) her interest in and strategies for managing and organizing everyday life, especially its information.

Originally envisioned as a more straightforward unobtrusive observation study, closer examination of the data gathered during this study—which emphasizes uploaded YouTube videos, but also includes some blog postings—reveals the 'guided tour' flavour of the majority (if not all) of her content. Notes and screen captures made based on her content show how *OrganizedLikeJen* (OLJ) repeatedly leads viewers on tours of sundry 'things' such as: spaces in her home, providing reasoning for arranging things as she does; meaningful objects like her daily planners and calendars, justifying her ways to 'keep track'; and even her day-to-day tasks, as when she tidies her kitchen or walks through her process of purging and reorganizing her closets or office files. A sample of the 'tours' that OLJ offers on her YouTube channel are included below, in Figure 2.

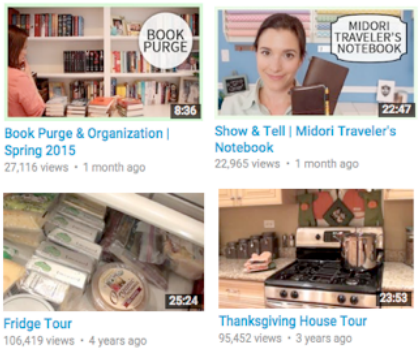

Figure 2. Four sample thumbnails from OLJ's YouTube channel (now *Pretty Neat Living*) showcasing the types of 'guided tours' she offers (clockwise from the top left): a book purge and organization process, notebook walkthrough, fridge tour, and seasonal home tour.

As OLJ plans, creates, and produces her videos on her own initiative, it is her voice and story that is foregrounded for the duration of each. For example, in her "Thanksgiving House Tour" YouTube video, she leads viewers from her front door—"this is my entry hallway, it's not supposed to rain tomorrow, so I didn't put any towels out"—through her dining and family room set-ups, pointing out all the cherished decorations and recounting her family traditions along the way, finally stopping at her refrigerators, where she tells how she is "very, very proud" of herself for being able to fit two extra-large turkeys inside, going on to explain her process for preparing these.

One obvious downside to virtual, unobtrusive guided tours such as those in this study is that a researcher is unable to ask questions or further probe issues raised. However, as OLJ's videos typically range between fifteen and thirty minutes in length, she already covers much of the detail that a co-located researcher might ask after. Of course, what is gained from such videos is likely to be an idealized picture of whatever video theme has been chosen. Still, non-co-located tours, or other participant-led narratives, may be a useful component of a larger research design that also involves follow-up interviews or elicitations, particularly if geographic distance or participant comfort are issues.

CONCLUSION

The guided tour technique positions researchers and participants as "co-researchers" (Everett & Barrett, 2012, p. 33) *in situ,* sharing an experience, and facilitates their "musing together" (p. 36). As Malone (1983) pointed out, they are at the same time amenable to "time and budget constraints" (p. 101). Past research would suggest that guided tours are also enjoyable for participants, and capable of generating findings and insights that have strong, enduring communicative power. Thomson (2015) provides a detailed discussion of the technique's weaknesses, though a more systematic study of factors such as social desirability bias or observer effects during guided tours would allow researchers to position where the technique stands relative to other methods. Similarly, exploring the opportunities brought by new technologies and services (for example, YouTube) will only continue to make conducting qualitative research more accessible, and continue to deepen what is known about the guided tour technique itself.

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